

Project Scaling Procedure

OVERVIEW

Purpose	The purpose of this procedure is to identify the “size” for a project. The size will determine the appropriate amount of effort for the project management deliverables. This approach is necessary to allow for flexibility yet provide appropriate control. It also ensures that the project management processes are usable regardless of the size or complexity and provides the documentation that forms the basis of ITS’ project knowledge.
Pre-Conditions	<ul style="list-style-type: none"> Project request has been approved and prioritized
Post Conditions	<ul style="list-style-type: none"> The process of project definition can begin
Completed by	Project Manager
Necessary Participants	The project manager and his/her manager

PROCEDURE

1.	Select the appropriate number for each of the project aspects using the Project Scaling Worksheet . This is accomplished by selecting the appropriate number for the current project for each of the ten aspects listed. It is important to select a value for every aspect. A score of zero for any of the aspects will cause the total to be inaccurate and cause the wrong “size” to be selected.
2.	Calculate the total of the numbers selected for each aspect to identify the “size” to be used for the project.
3.	The Project Manager then discusses the results with their manager and both people initial the Project Scaling Worksheet.
4.	Based on the results of the Project Scaling Worksheet, the Project Manager reviews the Project Requirements by Size chart for the deliverables that are needed for the project.
5.	Place the Scaling Worksheet in the Project Book for future reference.

NOTES

- In the Scaling Worksheet, the *projected costs* include all the costs associated with the project. That includes any vendor/contractor costs, any infrastructure costs, salaries of internal people on the project and any other costs the customer may incur. The *estimated duration* is the effort (in terms of months) that will be required to complete the project. *Stakeholder support* should be based on the interest/desire shown by the stakeholders. It is also the willingness of the stakeholders to commit resources to make the project succeed.
- This process determines the “size” at the beginning of the project. Over the course of the project the “size” can change. For example, if there are a significant number of change orders that extend the duration of the project, more people are added to the project team or more users are impacted because of a change in functions. The Project Manager needs to be aware of this and if the project size does change then the deliverables need to change also.

Project Scaling Worksheet (Draft)

Project Aspect	Number
A) Criticality to business (Impact to business if project not successful) Minimal [Little impact on business].....1 Moderate [Business would suffer loss in time, money, information, etc.]....5 Major [Business would be severely impacted].....10	
B) Number of end users (People who are impacted by project) Less than 25 end users.....1 25-250 end users.....3 Greater than 250 end users.....5	
C) Anticipated complexity of project Straight forward [No new technologies].....1 Challenging [Significant changes to proven technologies].....3 Difficult [New technologies, multiple old technologies].....5	
D) Projected costs (Includes all costs i.e., infrastructure, salary costs, customer costs) Less than \$25,000.....1 \$25,000-\$199,000.....3 \$200,000-\$499,000.....5 \$500,000 or above [Need Feasibility Study (ENE)].....10	
E) Estimated duration Less than 3 months.....1 3-6 months.....3 6-12 months.....5 Multi-year.....10	
F) Stakeholder support Strong stakeholder/management support.....1 Moderate stakeholder/management support.....3 Limited stakeholder/management support.....5	
G) Anticipated project team size (Total number of people on project team, including customers, vendors, etc.) Less than 4 people.....1 4-10 people.....3 Greater than 10 people.....5	
H) Project team experience with project management, technology and/or applications Very familiar.....1 Somewhat familiar.....3 Limited or no experience.....5	
I) Project team experience with the project's customers and their business Very familiar.....1 Somewhat familiar.....3 Limited or no experience.....5	
J) Number of Offices/Divisions/External stakeholders groups involved Less than 3.....1 3-6.....2 Greater than 6.....3	

Total of Aspects:	10-21	22-34	35-48	49-63
Project "Size"	Small	Medium	Large	Multi-year

Projects 40 hours or less would generally fall into a maintenance or release process